

# ***SCHOOL FINANCIAL SERVICES REPORTING MEMBERSHIP AND PUPIL COUNT***



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**Winter At A Glance” WASBO  
Year of Success Program  
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# Counting Pupils and Determining Membership

- ◎ It's one of the most important things you will do -
  - The data is used to determine (current year's) revenue limits and
  - also used to establish (next year's) state equalization aids.
- ◎ It's also not as simple as it sounds,
  - New delivery methods
  - Non-traditional settings
  - Cooperative Programming





# SFS five(5) Student Counting Reports

- 3<sup>rd</sup> Friday in September Pupil Count
  - **PI-1563** Report
- 2<sup>nd</sup> Friday in **January Pupil Count**
  - **PI-1563** Report (opens in 39 days)
- Summer School Report
  - **PI-1804** Report
  - 2015 Summer School is for 2015-2016 school year
- Youth Challenge Academy Pupil Count
  - **PI-1563** YCA Report
  - September and January
- June Census
  - **PI-1505** Census (Common School Fund)





# Course Options opportunity (is a parental choice):

- Per s 118.52; A student attending under Course Options will have no impact on the membership FTE count in the district he or she is attending for 1 or 2 courses under this program.
- **On the Pupil Count (PI-1563) – January portal (opening screen):**
  - Non-Resident Course Options Students attending your district under §118.52 should be included in Step 1- **Headcount** of the wizard and removed in Step 2- **Non-Resident Reduction** (tuition) count.
  - If you have Resident Course Options Students attending your district under §118.52 (residents open enrolled out, but returning for up to two classes) Do NOT double count!, this student as they are already included in Step I4: Plus Resident Additions.
- Per s 118.145(4) or 118.53; only part-time students (pupils who are not full-time enrolled in a Wisconsin public school) will impact the membership FTE count and the next three slides will explain...



# Counting resident Home-schooled pupils

- Under 2013 Wisconsin Act 20 (2013-15 State Budget), a ***home-schooled pupils*** may take up to 2 courses per semester at a public school in their ***resident*** district, in any grade (formerly just high school grades in the resident district.)
- **Resident home-schooled pupils will be count in the PI-1563.**
  - FTE = total hours in the semester the student attended / total hours per year at each grade level.
  - Example: In the 2nd semester, a 6th grader is taking an Art class and a Music class.
    - Each class meets for 1.0 hour and is scheduled for 3 times/week for 19 weeks ( 2 classes x 1.0 hr x 3 times/week x 19 wks = 114 hours)
    - The 6th grade is scheduled for 1,075 hours per year).
    - This student will generate **0.11 FTE** that will be added as “**Resident, Part-Time FTE**” for General Aid Purposes.



# Counting non-resident Home-schooled pupils

- ◎ Under 2013 Wisconsin Act 20 (2013-15 State Budget), a ***home-schooled pupils*** may take up to 2 courses per semester at a public school in a ***non-resident district***, in any grade (formerly just high school grades in the resident district.)
- **Non-resident** home-schooled pupils will be counted differently –
  - Not reported in the PI-1563.
  - Use the “***Workbook for Reporting Part Time Non-Resident Attendance***” spreadsheet on the SFS website.
  - The rate will be 0.25 FTE per course with a maximum of 0.50 FTE per non-resident, home-school pupil.



# Part time Private, Parochial and Tribal School Resident Pupils

- Act 20 had no impact on part time private school (including parochial and tribal schools) pupils,
- These **residents**, private/tribal pupils may take up to two courses per semester in the high school grades only (9-12) at a resident public school.
  - The student must meet the standards for admission to the course
  - The school board decide if there is sufficient space in the classroom.
- Part Time Private/Tribal School Pupils will be entered in **Step 1, Headcount** and in **Step 3, Resident Reductions**, of the PI-1563
  - The pupil count wizard will direct districts on what to enter.
  - The FTEs for this set of pupils will be calculated automatically from this data and added to the district's membership count for General Aid purposes.





# 2013 Act 20 – change to counting part-time pupils :

District of **attendance** may count non-resident, home-schooled pupils enrolled part-time

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- Different methods to count resident vs. non-resident part-time pupils

Pupil comes from:	RESIDENT	NON-RESIDENT
Home School [All grades]	# PT Pupil Hours / FT Hours for Grade = FTE	0.25 FTE per course (max of 2 courses)
Private School [Grade 9-12]	# PT Pupil Hours / FT Hours for Grade = FTE	<del>Cannot be counted</del>





# In review: **PI 1804/1805 Summer School Pupil Count Report**

- Report used to collect district FTE (full time equivalency) data for the past summer term.(Summer school starts the school year!)
- FTE data is used in the calculation of a district's (current year) revenue limit and (next year) equalization aid.
- The summer school report is one of the few reports that ask for an FTE count as opposed to a head count.
- Summer School Fee are a significant part of a membership audit.



# In review: PI 1563 September Pupil Count Report

- Report used to collect district count data for the 3rd Friday in September.
  - **This data (values) is Not used on the Revenue Limit Worksheet.**
- Data from this report is converted to full-time equivalency (FTE) and used in the calculation of a district's revenue limit and equalization aid.
- (2013 Wisconsin Act 20): **Part-time non-resident home-schooled pupils will impact your district's equalized aid. (See slide 6)**



# PI 1563 January Pupil Count Report

- Report used to collect district count data for the 2<sup>nd</sup> Friday in January. **(open 01-08-2016 through 01-22-2016)**
- Reporting process is the same as the PI 1563 September Pupil Count Report
  - Use the PI 1563 PUPIL COUNT WORKSHEET to compile the data before entry.
- Data is converted to Full Time Equivalency (FTE) and **used in the calculation of a district's equalization aid.**

**Districts may request a change to this date as a result of school not being in session. "New" count date is usually the Thursday before or Monday after.**

**Send an e-mail to [DPIFIN@dpi.wi.gov](mailto:DPIFIN@dpi.wi.gov)**



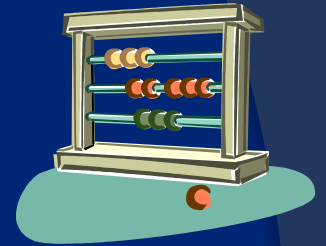
# Challenge Academy

- ⦿ Districts with challenge academy students should not report these students in the September or **January** pupil count reports.
- ⦿ These students are entered in a separate “Challenge Academy” online report (PI-1563 YCA).
  - **The January report** will reconcile the student count for both September and January of the current school year.



# June Census

- All districts must report the number of residents that are at least **4 years old but not yet 21**.
- HEAD COUNT – not an FTE
  - Ages 4-13 if in a K-8 district
  - Ages 14-20 if in a high school district
- Per 120.18 Wisconsin Statutes - 2 methods available to calculate the census head count
  - Conduct a Physical Census on June 30<sup>th</sup> - 120.18(1)(a)1
  - Generate a number based on a mathematical calculation - 120.18(1)(a)2.
- Report Head Count via an online report accessed via the “School Financial Reporting Portal” **July 1 to August 15, 2016**.





# General Count Guidelines -1

- In general, count the student if:
  - The student is a district resident.
  - The student is present for direct instruction on the count date or meets the before and after rule.
  - The student is age eligible.
  - The District is financially responsible for the student's educational program. (see next slide)





# General Count Guidelines - 2

- ◆ Full-time resident pupils in attendance elsewhere, but your district is paying for their education.
  - Open Enrollment (your residents going elsewhere)
  - Tuition Agreements
  - CESA Programs
  - Tuition Waivers (**Be careful with this one.** These situations involve kids moving out/in of a district mid-year.)
    - Sometimes, you still can count a student in the year that they have moved out of your district....and, sometimes you can't count a new kid that has recently moved into your district.
    - *Please call us if you have a student in this situation.*





# General Count Guidelines – 3

- **Present** – The student is in attendance **for instruction** on the count date.
- **Absent** - The pupil is absent on the count date, but has attended at least one day during the school year prior to the count date **and** at least one day during the school year after the count date, **and** *has remained a resident of the district during the period of absence.*





# PI-1563 Pupil Count Process

Head  
Count



Non-Resident  
Reductions



Resident  
Reductions



Resident  
Additions



Adjusted  
Head  
Count\*

Identify all students, regardless of residency, being directly served by the district.

Subtract all non-resident students being served by the district.

Subtract all resident students being served by the district that don't meet the count guidelines. (less than full time, outside age eligibility)

Add all resident students who are receiving educational services from other districts or programs **and for which your district is paying the cost** of full-time tuition.

Result is the students that are residents for which you are financially responsible for.

\* Will be converted to full-time equivalency.



# Preschool Special Education

- ⦿ Students **must** be at least 3 years of age **as of the count date**.
- ⦿ Student **must** have an **IEP** (Individualized Education Plan) and be receiving instructional services.
- ⦿ No minimum required number of instruction hours.



# Counting 4 Year Old Kindergarten Pupils - 1

- The criteria for the program:
  - the 4 year old kindergarten program is open to all students
  - the program is funded by district resources—not solely by Title One funds
  - **the student being counted was at least 4-years old on or before September 1<sup>st</sup>**





# Counting 4 Year Old Kindergarten Pupils - 2

- Remember the 4 Year Old Kindergarten can have two options regarding hours of service
  - **Check the Open Enrollment students you are counting (in and out) for correct program.**
    - **Does the resident district have a 4K program?**
- 4 Yr – 437 Hours: program shall have at least 437 hours of instruction, which can include up to 87.5 hours of outreach activities. (0.5 FTE)
- 4 Yr – 524.5 Hours: program shall have at least 437 hours of instruction and 87.5 hours of outreach. The school shall **NOT** substitute instructional time for outreach activities. (0.6 FTE)



# 5 Year Old Kindergarten (program options)

- ◉ 5 Year Old – Half Day Program
- ◉ 5 Year Old – 3 Full Day Program
- ◉ 5 Year Old – 4 Full Day Program
- ◉ 5 Year Old – 5 Full Day Program
- ◉ 5 Year Old – Blended Program



**The student must be at least 5 years of age  
on or before September 1<sup>st</sup>.**



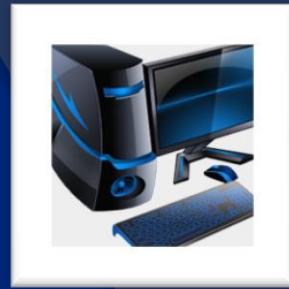
# Counting Pupils in Grades 1 – 12

- ◉ Students must be 6 years of age on or before September 1<sup>st</sup> of the current year.
- ◉ In all count categories, the student must meet the age requirement **or** be admitted under early admittance guidelines as defined by the Board of Education.
  - When was the last time you reviewed the Board Policy on early admittance?





# SAFR Reporting Portal



- The School Financial Services (homepage) website will be updated in the near future.
- Our homepage will remain the starting point to access the “School Finance Reporting Portal”.
- It will be important that each school district staff member who enters data is aware of the upgrade in our website.
- Please monitor future ListServe emails for additional information.



# SAFR Reporting Portal

## School Finance Reporting Portal

### [Log In to View or Submit Data](#)

District staff will use the ID and Password created for them by the PI 1500 District Contacts report to view or to enter and submit data to the department. After entering the new ID and Password, district staff can proceed to the reports for which they have been authorized to file data. Navigation to the district reports is the same as before. Just click "Continue." As a note, the 2008-09 ID and Password will no longer allow district staff to enter data.

### [Public View Submitted District Data](#)

This link will allow the user to view any district data that has been officially submitted to the department. It looks very much like the current portal screen except that the user cannot access areas which require a password.

### [Auditors Log In to Submit Data](#)

District auditors will use their previously assigned SAFR ID and Password to enter and submit data to the department.

### [CESA & CCDEB Log In to Submit Data](#)

CESA and CCDEB will use their previously assigned SAFR ID and Password to enter and submit data to the department.

### [DPI](#)

Internal use only.

*For questions about this information, contact [dpifin@dpi.wi.gov](mailto:dpifin@dpi.wi.gov) (608) 267-9114*



# SAFR Reporting Log In Screen

## School Finance Reporting Portal Log In Screen

To proceed to the reports that you are authorized to submit or amend on behalf of the district, you must enter your ID and password below.

District staff should have received an ID and Password from the Superintendent/Designee. The Superintendent was required to complete the new PI 1500 Contacts Report which generated the new ID and password.

Please contact your superintendent or a school finance consultant should you have questions.

**Log In**

ID:

Password:

☐ Remember me next time.





# SAFR “District Home” page

District Home - Windows Internet Explorer

https://www2.dpi.state.wi.us/safr\_ro/district\_home.asp?dist=0336


File Edit View Favorites Tools Help

★ Favorites ★ Suggested Sites Web Slice Gallery

District Home

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

**Beaver Dam (0336)**

 **OR**

- [Introduction](#)  
A note from the Director
- [Status & Due Dates](#) ■ ■ ■  
Information on district data entry and upcoming deadlines
- [Financial Data Home](#)  
Includes the PI-1505 Full Financial Report
- [Non-Financial Data Home](#)  
Pupil Count (Summer, September, January), Pupil Transportation, School Calendar, School Census, Youth Challenge Academy
- [FTE Reports](#) ■ ■ ■
- [PI-1500 Contacts Report](#)  
Identify specific district staff for report submission authorization
- [District Contact History](#)  
Report Submission History
- [Auditor](#)

**Related Links**

- [SPED Licensure](#)
- [All-District Reports](#)
- [Activity Reports](#)
- [SFS Reports](#)

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# SAFR Non-Financial Data Home

SFS Non-Financial Data Home - Windows Internet Explorer

https://www2.dpi.state.wi.us/safr\_ro/NonFinancial\_home.asp

File Edit View Favorites Tools Help

SFS Non-Financial Data Home

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

**Beaver Dam (0336)**

**Non-Financial Data Home**

Non-financial data, such as **headcounts** or the **number of students**, are collected in the following categories:

**Go To**

- [District Home](#)
- [Financial Data](#)
- [Non-Financial Data](#)
- [Change District](#)

**People**

- [PI-1500 Contacts](#)
- [Contact History](#)
- [Auditor](#)
- [SFS Consultants](#)
- [Program Contacts](#)

**Related Links**

- [SPED Licensure](#)
- [All-District Reports](#)
- [Activity Reports](#)

- [Pupil Count - Summer](#) (PI-1804 / PI-1805)
- [Pupil Count - September](#) (PI-1563)
- [Pupil Count - January](#) (PI-1563)
- [Youth Challenge Academy - September](#) (PI-1563-YCA)
- [Youth Challenge Academy - January](#) (PI-1563-YCA)
- [Youth Challenge Academy \(to FY05-06\)](#) (PI-1563-YCA)
- [Pupil Transportation](#) (PI-1547)
- [Pupil Transportation Summer](#) (PI-1547-SS)
- [School Calendar](#) (PI-1505-Calendar)
- [School Census](#) (PI-1505-Census)

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# FTE Report

- ◉ Once the *PI-1563 Pupil Count* has been submitted the pupil count data is then converted to full time equivalency (FTE) units.
  - The FTEs will be calculated automatically and displayed in an FTE report for each district.
- ◉ **Anytime the district changes a number** within the September, January, or Summer Pupil Count Reports, **the report automatically updates.**
- ◉ The FTE report is located on the District Home (page) within the School Finance Reporting Portal.
  - See slide 26, below “Non-Financial Data Home”



# Reconciliation Worksheet

Near the bottom of the “Membership” - [http://sfs.dpi.wi.gov/sfs\\_membbrpt2](http://sfs.dpi.wi.gov/sfs_membbrpt2) webpage is the “Reconciliation of Pupil Counts” information and spreadsheets

5	RECONCILIATION OF SEPTEMBER COUNT TO JANUARY COUNT					
6	<b>Fiscal Year 2015-16</b>					
7	<b>IMPORTANT:</b> If you have Office 2007, you will see a Security Warning above this worksheet					
8	and just under the toolbar. Click on the "Options" button and then "Enable this					
9	Content". This will refresh your data pulling in the most recent pupil counts from					
10	the live district SAFR PI-1563 pupil counts.					
11						
12	<u>Column 1</u>	<u>Column 2</u>	<u>Column 3</u>	<u>Column 4</u>	<u>Column 5</u>	<u>Column 6</u>
13	Pupil Count				Pupil Count	
14	September			Adjusted	January	
15	Total	Additions	Subtractions	Total	Total	Difference
16	Preschool Special Education	19	0	19	0	(19)
17	4YK - 437 hours	3	0	3	0	(3)
18	4YK - 524.5 hours	225	0	225	0	(225)
19	5YK - half day	0	0	0	0	0
20	5YK - 3 full days	0	0	0	0	0
21	5YK - 4 full days	0	0	0	0	0
22	5YK - 5 full days	231	0	231	0	(231)
23	5YK - blended	0	0	0	0	0
24	Grades 1-12	3,114	0	3,114	0	(3,114)
25						
26	Totals	3,592	0	3,592	0	(3,592)

After completing the PI-1563 January Column 5 will pre-populate.

Complete this each year. Districts are **REQUIRED** to have it on file in event of a membership audit.

The District completes columns 2 and 3 and needs to include ALL the students in and out between September and January and *not* just the net change.





# Report Amendments

- **Up until the due date** for the January pupil count report, districts may go into either the September, January, or Summer Pupil Count Reports and make any necessary changes.
- **After** the January Pupil Count Report has been submitted and **membership audits have been announced**, districts either make changes thru the auditor or contact the School Finance Team to make changes.
  - [DPIFIN@dpi.wi.gov](mailto:DPIFIN@dpi.wi.gov)



# Membership Audits

- On or about February 1<sup>st</sup>, the School Finance Team will announce which districts are required to have a membership audit.
- The district's auditor will verify the district's reported counts for:
  - 3<sup>rd</sup> Friday in September
  - 2<sup>nd</sup> Friday in January
  - Summer School (**as well as fees**)
  - Youth Challenge Academy





# Enrollment drives everything!

- ◉ Know and understand your district's enrollment trends.
- ◉ Find a reliable method to project your district's enrollment.
  - There are smaller companies that will do 5-year projections.
- ◉ You'll need estimates of Summer - 2016 and 3<sup>rd</sup> Friday in September, 2016 before you begin the 2016-17 budget development process with the revenue limit worksheet.



# Membership and Counting Pupils Quiz

- We are providing speech/language services to a pre-school age district resident in their home with one of our teachers. Can we count?

Yes

- Student is in residential treatment center placed there by the county. We are not footing the bill for that treatment, but we are still responsible for keeping the IEP up to date. Can we count student?

No

- Student attends up to (and on) the 2nd Friday count date and then withdraws on the next Monday. Can we count?

Yes



# School Finance Contacts

*Please give us a call if you have questions  
(all 608 Area Code :*

- |                              |          |
|------------------------------|----------|
| ✓ Robert Soldner, Director   | 266-6968 |
| ✓ Debi Towns, Asst Director  | 267-9209 |
| ✓ Bruce Anderson, Consultant | 267-9707 |
| ✓ Carey Bradley, Consultant  | 267-3752 |
| ✓ Dan Bush, Consultant       | 267-9212 |
| ✓ Gene Fornecker, Auditor    | 267-7882 |
| ✓ Brian Kahl, Auditor        | 266-3862 |
| ✓ Karen Kucharz, Consultant  | 266-3464 |
| ✓ Derek Sliter, Auditor      | 267-9218 |



